Discover How Everyone Benefits From Planned Gifts.
How and why to plan a gift.

Planned or deferred giving is a commitment made now to make a gift to a charitable organization in the future, either during your lifetime or through your will. The gift may be conveyed through bequests, gift annuities, and charitable trusts of various kinds. The assets conveyed to the charity are often in forms other than cash: stocks and bonds, marketable real estate, life insurance policies, retirement funds and the like. It is highly recommended that you work closely with a financial planner to create an estate plan that meets your future intentions and current needs. Here are just a few of the options to keep in mind when creating your estate plan:

<table>
<thead>
<tr>
<th>Your Goal</th>
<th>Your Gift</th>
<th>Your Method</th>
<th>Your Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make a gift that costs you nothing during your lifetime</td>
<td>Gifts Through your Will or Trust (“Bequest”)</td>
<td>Include a gift of cash, property, or a share or your estate through your will or trust</td>
<td>A gift that does not affect your cash flow, and you can adjust your gift as circumstances change</td>
</tr>
<tr>
<td>Make a gift while leaving more of your estate to your heirs</td>
<td>Gifts of Retirement Assets (e.g., 401-K, IRA)</td>
<td>Name us as the beneficiary of your retirement plan, and pass less-taxed assets to your heirs</td>
<td>Avoid up to 60% income tax on your retirement assets; pass more of your estate to your heirs</td>
</tr>
<tr>
<td>Make a large gift at little cost</td>
<td>Gift of Life Insurance</td>
<td>Donate a life insurance policy you no longer need or name us in an existing one</td>
<td>Take a tax deduction now; take possible future deductions through gifts to pay policy premiums</td>
</tr>
<tr>
<td>Plan a future gift in the simplest way possible.</td>
<td>Gift the balance of your account (POD or TOD)</td>
<td>Designate the balance of your bank or brokerage account, retirement plan, annuity or life insurance policy to go to us.</td>
<td>Make an extraordinary contribution that costs you nothing now and is as simple as signing your name.</td>
</tr>
<tr>
<td>Make a gift and receive a steady income for life</td>
<td>Charitable Remainder Unitrust, Charitable Remainder Annuity Trust</td>
<td>Share your assets with us in a plan that gives you an income for life and passes us the remainder</td>
<td>Diversify assets, avoid or defer capital gains tax, receive charitable tax deduction, secure often greater income and possible inflation protection</td>
</tr>
<tr>
<td>Make a gift and receive a guaranteed “paycheck” for life</td>
<td>Charitable Gift Annuity</td>
<td>Donate cash or securities in a plan where the remainder comes to us after your passing</td>
<td>Receive higher rate of return tax-advantaged payments for life, charitable tax deduction, and avoid capital gains tax</td>
</tr>
<tr>
<td>Make a gift while avoiding capital gains liability</td>
<td>Gifts of Appreciated Securities</td>
<td>Give us appreciated stocks, bonds or mutual funds to sell and use the proceeds</td>
<td>Make a significant gift; receive an immediate income tax deduction; pay no capital gains tax</td>
</tr>
<tr>
<td>Make a gift that preserves your assets for your heirs</td>
<td>Charitable Lead Trust</td>
<td>Use appreciating assets to create a trust that will pay us income for a period of years, and then pass the assets back to you or your heirs</td>
<td>Shelter your growing assets and benefit us right away; reduce or eliminate gift and estate tax</td>
</tr>
</tbody>
</table>

Although not required, it is strongly recommended that if you have included Stop Predatory Gambling Foundation in your estate planning that you submit the Bequest Intention Form. If you have any questions, please contact Kate Rozzi at kate@stoppredatorygambling.org.
CONFIDENTIAL Planned Giving/Bequest Intention Form

Donor Name(s): ____________________________  ____________________________
Date(s) of Birth: ____________________________  ____________________________
Address:  ________________________________  E-mail:  ________________________
                                                      ________________________  Phone:  ____________________________

I/We have provided for the following bequest to the Stop Predatory Gambling Foundation, and, based on current estimates, believe there will be sufficient assets in my/our estate(s) to satisfy this bequest in the future. I/We may, at any time, choose to satisfy this gift intention during my life/our lives.

This statement may be altered by me/us at any time in writing. I/We intend for this statement to operate as a good faith declaration of my/our hopes and intentions, and do not intend this statement to create an obligation that is binding and enforceable against my/our estate. Should I/we change this provision in the future, I/we will notify the National Director and/or Director of Development at Stop Predatory Gambling.

Type of Bequest:

____ Specified Dollar Amount
____ Percentage of Residuary Estate
____ Beneficiary Designation (e.g. retirement plan, life insurance)

Beneficiary Description: ______________________________________________________

____ Specific Property (e.g. real estate address, art, collection, etc.)

Property Description: ______________________________________________________

Estimated Current Value of Bequest Provision: $ __________  OR  __________ %

☐ I/we have attached a copy of the pertinent provision(s) of my/our estate plan(s)(not required but recommended).

__________________________________________  ____________________________
Donor Signature  Date

__________________________________________  ____________________________
Donor Signature  Date

Thank you for your generosity in making this gift.